

General Market Assessment

Summary Report

Part of the Washington State Transportation Commission 2010 Ferry Research Initiative



Conducted by
Market Decisions Corporation
April-May 2010



Preface

- ❖ In 2010, the Washington State Transportation Commission (WSTC) changed the process for how research is conducted regarding Washington State Ferries (WSF). In the past, stand-alone research projects were executed, but some of the issues facing ferry operations are of a longitudinal nature (changes over time). The decision was therefore made to create the Ferry Riders' Opinion Group (FROG). FROG is an online community where ferry travelers will have an ongoing opportunity to weigh in on ferry issues through surveys and quick polls (single questions).
- The research initiative in 2010 consists of the following main phases:
 - Spring Customer Survey (target audience: consumers)
 - Mode Shift and Elasticity of Demand Research (target audience: consumers)
 - Freight Survey (target audience: freight customers)
 - General Market Assessment Survey (target audience: consumers)
 - Summer customer Survey (target audience: consumers)
 - Capital Funding (target audience: consumers)
 - Fare Strategies (target audience: consumers)
- The focus of this report is the General Market Assessment survey.
 - A comprehensive report of all phases will be available fall 2010.
- ❖ All research was conducted by Market Decisions Corporation with input from the WSTC Research Team. For questions about this research, please contact Reema Griffith at WSTC (360) 705-7070.



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Methodology

- The following report presents the findings to the general market assessment research. The main objectives of this research are to understand:
 - How are the ferries utilized by greater Puget Sound residents?
 - Last route taken, purpose for trips, how frequently travelled, etc.
 - How has utilization changed since 2008?
 - What factors contributed to the changes and how can they be reversed by WSF?
 - How important do Puget Sound residents think WSF is as a contributor to the overall economy and recreation/tourism in the region?
 - What are Puget Sound residents understanding of WSF operational and capital funding?
- Respondents were screened to meet the following criteria:
 - Live in one of the target counties/areas (King, Vashon Island, Snohomish, Pierce, Clallam, Island, Jefferson, Kitsap, San Juan, or Skagit).
- A total of 1,200 telephone interviews were conducted with a random sample of Puget Sound residents between 05/12/2010 and 05/15/2010.
 - A sample of 1,200 yields a maximum sampling variability of +/- 2.8% at the 95% confidence level.
 - The interviews were conducted by Market Decisions Corporation between 5 p.m. and 8 p.m. PDT on weekdays and between 10 a.m. and 7 p.m. PDT on weekends.



Methodology (Cont.)

- For this project quotas were set so that results can be analyzed by different geographic areas.
 - Because quotas were set, it was necessary to weight the data so that the total is proportionate to the universe as a whole. The data was weighted following the 2008 format and results are comparable between the two waves. See appendix B for details.
 - For counties where ZIP codes are shown only residents within the listed ZIP codes are included in the research.
- Throughout the report these terms are used to define the following customer segments:
 - Puget Sound residents refers to the total sample
 - East side communities are: King, Snohomish, Skagit, Pierce
 - West side communities are: Kitsap, Clallam, Island, Jefferson

Sample Size	Area
350	King excluding Vashon Island
40	Vashon Island
200	Snohomish
200	Pierce
100	Eastern Clallam (98362, 98382, 98363)
50	Island
40	Eastern Jefferson (98368, 98339, 98358, 98325, 98365, 98376, 98320)
150	Kitsap
20	San Juan
50	Western Skagit (98221, 98257, 98238, 98292, 98273, 98233, 98232)

- In 2008 most of the general market assessment survey was administered only to riders who rode less than once every 3 months (infrequent riders). So throughout this report the comparison between 2008 and 2010 is done based on infrequent riders unless otherwise specified.
 - Most of the results from 2010 are analyzed based on comparison between East and Westside communities.



Executive Summary

Ferry Ridership:

- People who report ever riding the ferry has declined significantly from 2008 to 2010 (91% vs. 85%, respectively).
 - However, among those who ever travel on WSF, ridership has grown: In 2008 half (51%) of infrequent travelers said their frequency had remained the same; in 2010 that number was 64%, while only 31% report a decrease in their ferry riding frequency compared to 41% in 2008.
 - As was the case in 2008, 7% have of Puget Sound residents have stopped riding WSF completely.
 - Residents living in Westside communities as significantly more likely to ever ride WSF than residents living in Eastside communities (98% vs. 83%) and their frequency is higher as well: Ride at least once every 3 months: 63% Westside vs. 23% Eastside.
- Westside residents use WSF for a variety of purposes, whereas Eastside residents are more likely to take a trip on WSF for tourism/recreation than any other purpose.
 - This is in line with results from 2008.
- * Westside residents who travelled in the past 30 days take more trips on WSF than Eastside residents (7.6 vs. 3.7 average trips in past 30 days).
 - Westside residents take the same number of trips on WSF throughout the year whereas Eastside residents increase their usage May through September.

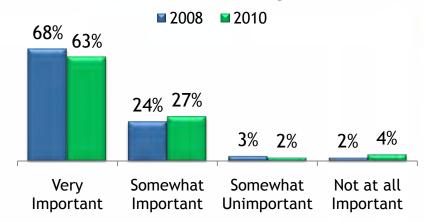


Executive Summary (Cont.)

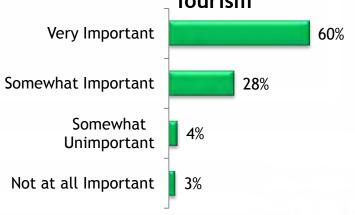
Impact of WSF:

- The perceived importance of WSF on the general economy and growth of the region has declined slightly from 68% in 2008 to 63% in 2010 "very important."
 - Westside residents place significant more importance on WSF than Eastside residents (77% vs. 61% "very important").
- New in 2010, residents were asked about the importance of WSF with regards to encouraging tourism. Sixty percent (60%) rate WSF as "very important."
 - Again, Westside residents give a significantly higher rating than Eastside residents (69% vs. 59% "very important").

Importance of WSF to Economy and Growth of the Region



Importance of WSF to Encourage Tourism





Executive Summary (Cont.)

Funding of WSF:

- ❖ Almost three in five (57%) think that the daily operating expenses for WSF should be funded through a mix of ferry fares and statewide taxes.
 - Among those who thinks the daily operations should be funded through a combination of fares and taxes, a third (33%) don't know what percent should be paid by riders. Those who have an opinion feel riders should pay 56.6% of the daily operating costs, on average.
- On average, Puget Sound residents thinks that fares cover 44.2% of WSF's annual operating expenses (Eastside 43% vs. 51% Westside).
 - Almost half (44%) thinks that it is appropriate that ferry fares cover 2/3 of operating expenses.
 - Westside residents are significantly more likely to think that fares should cover a smaller percentage (27% vs. 15%), where as Eastside residents think that fares should cover a greater percentage (26% vs. 13%).
- Residents are divided in roughly thirds when it comes to who should pay for capital investments (33% everyone; 30% Puget Sound Residents; 26% Ferry Users).
 - Westside residents are significantly more likely to say "everybody" should pay and they are less likely to want "ferry users" to pay compared to Eastside residents.



Detailed Study Findings

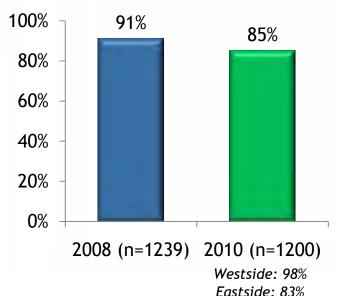


F1

Ferry Ridership

- A significantly lower percent of Puget Sound residents say they have ever ridden WSF in 2010 compared to 2008 (91% vs. 85%, respectively).
 - However, the last trip took place at approximately the same time as in 2008.

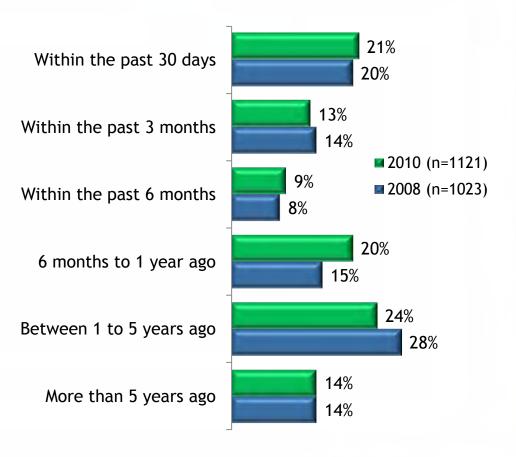
Ferry Ridership



Have you ever ridden a Washington State Ferry?

F2 When was the last time you rode a Washington State Ferry? Was it...

Last trip on WSF

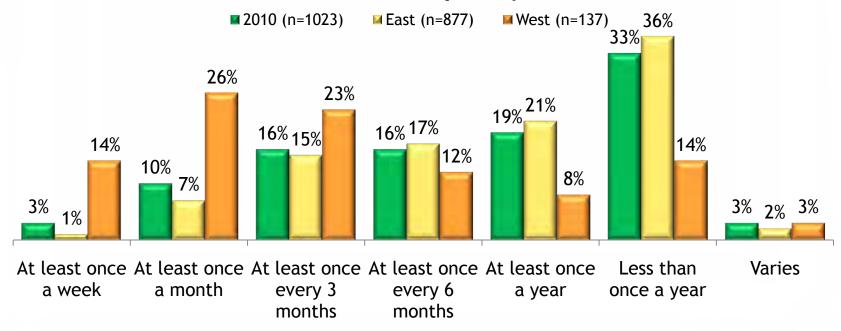




Overall Travel Frequency on WSF

- Residents living in Westside communities have a higher travel frequency than residents living in Eastside communities.
 - At least once every 3 months: 23% Eastside vs. 63% Westside.
 - Less than every 3 months: 74% Eastside vs. 34% Westside.

Travel Frequency



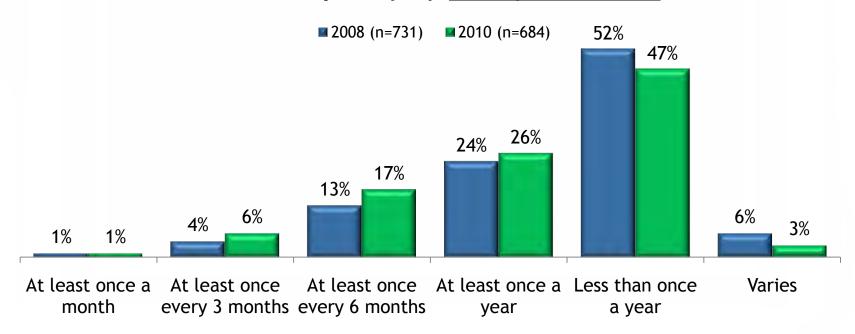
F3A2 How often do you ride Washington State Ferries?



Infrequent Travelers - Travel Frequency on WSF

- When looking at infrequent travelers (travel less than once every 3 months) there have been no significant developments between 2008 and 2010.
 - However, the travel frequency is trending higher in 2010 than 2008.

Travel Frequency by <u>Infrequent Riders</u>



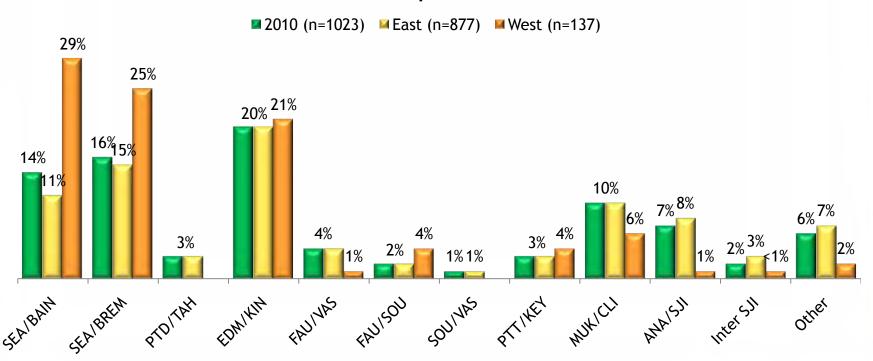
F3A2 How often do you ride Washington State Ferries?



Last Route Travelled

• Utilization of the routes by Puget Sound residents is fairly even between East and West side residents except that West side residents are significantly more likely to ride Seattle/Bainbridge (29% vs. 11%) and Seattle/Bremerton (15% vs. 25%) than East side residents.

Last trip on WSF

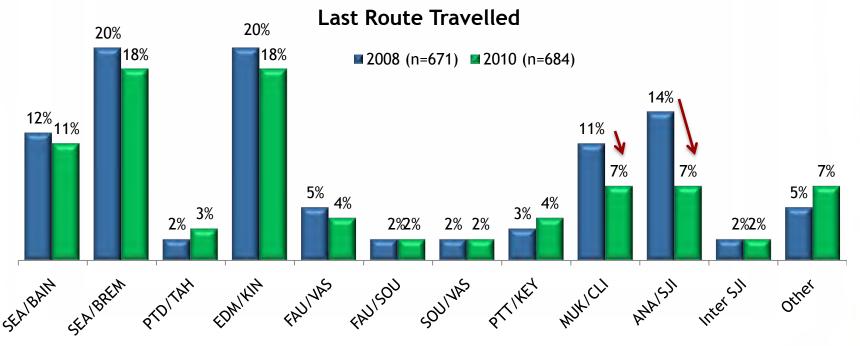


F3A What was the last Washington State Ferry route that you took?



Last Route Travelled (by infrequent travelers)

- Travel behavior has remained similar between 2008 and 2010 for infrequent travelers.
 - The Mukilteo/Clinton (2008 11% vs. 7% in 2010) and Anacortes/San Juan (2008 14% vs. 7% in 2010) routes are mentioned significantly less often as the last route travelled in 2010 compared to 2008.



F3A What was the last Washington State Ferry route that you took?

F3B What other Washington State Ferries routes, if any, have you taken?

F3C What Washington State Ferry route do you take most often?



Routes Utilized

- As seen earlier Westside residents are more likely to be traveling on most routes and the same pattern is seen when examining any routes ever ridden.
 - Eastside residents are more likely to have ever ridden Mukilteo/Clinton and Anacortes/San Juan than Westside residents.

	2010 (n=1203)		East	(n=877)	West (n=137)		
	Total	Most	Total	Most	Total	Most	
SEA/BAIN	31%	11%	27%	9%	54%	25%	
SEA/BREM	36%	13%	35%	10%	44%	30%	
PTD/TAH	6%	1%	6%	1%	4%	1%	
EDM/KIN	36%	20%	33%	20%	54%	20%	
FAU/VAS	14%	3%	15%	3%	7%	1%	
FAU/SOU	7%	2%	6%	2%	11%	6%	
SOU/VAS	7%	2%	7%	2%	6%	1%	
PTT/KEY	14%	3%	13%	2%	27%	5%	
MUK/CLI	21%	8%	22%	9%	13%	6%	
ANA/SJI	21%	9%	23%	10%	9%	<1%	
Inter SJI	7%	1%	7%	1%	6%	0%	
Other	12%	3%	12%	3%	8%	1%	

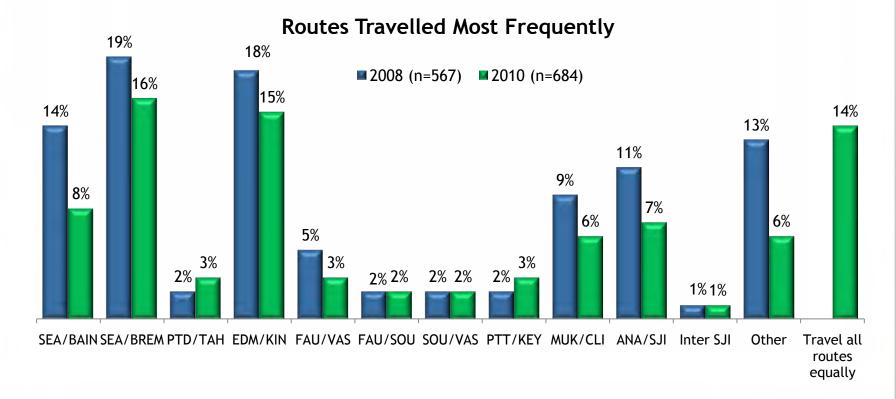
F3B What other Washington State Ferries routes, if any, have you taken?

F3C What Washington State Ferry route do you take most often?



Routes Used Most By Infrequent Travelers

- Care should be taken when comparing 2008 and 2010 for this question as a significant proportion of respondents responded "travel all routes equally" (14%).
 - Furthermore, in 2010, 15% don't know which route they travel most frequently.

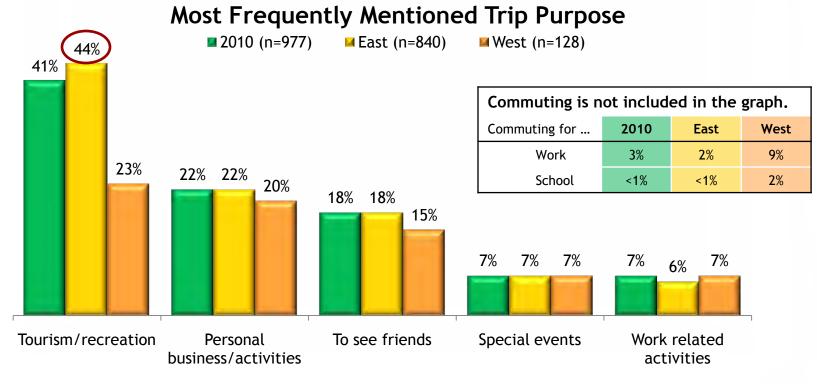


F3C What Washington State Ferry route do you take most often?



Trip Purposes

- Trip purposes are similar between Eastside and Westside residents.
 - However, Eastside residents are significantly more likely to travel for recreation than Westside residents.



You said your last ferry ride was on the [INSERT RESPONSE FROM F3A] ferry. What was your primary purpose for that particular trip?

NEW1 For what other purposes do you take any Washington State Ferries?

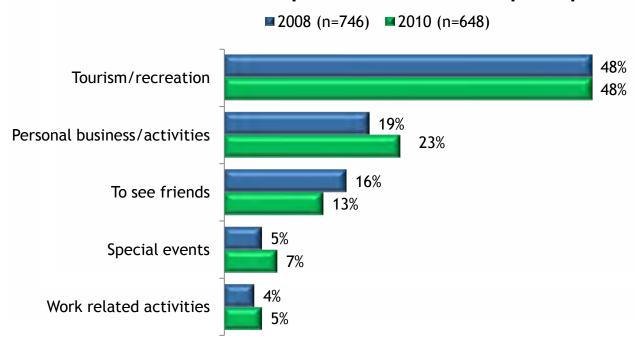


F4

Trip Purposes - Infrequent Riders

The reasons for travelling on WSF have not changed significantly from 2008 to 2010.

Most Frequent Mentioned Trip Purpose



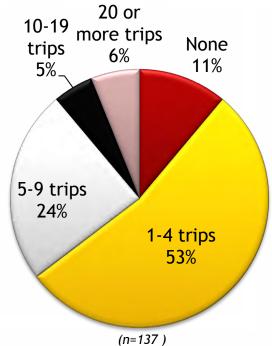
You said your last ferry ride was on the [INSERT RESPONSE FROM F3A] ferry. What was your primary purpose for that particular trip?



Travel Behavior - Monthly Riders

- Puget Sound residents who ride at least once a month have taken an average of 5.7 trips in the past 30 days.
 - Eastside residents are taking significantly fewer trips than Westside residents (3.7 vs. 7.6, respectively).
- Two-thirds (63%) take approximately the same number of trips in October through April as May through September.
 - A quarter (25%) make more trips May through September, which is mainly due to Eastside residents (33% vs. 17%).

Number of 1-way Trips Taken in Past 30 Days



Travelled at least once in the past 30 days)

F3B2 [F3A < 3] In the last 30 days (month of April), approximately how many one-way trips did you take on Washington State Ferries? If you took a round-trip, count that as two-one way trips.

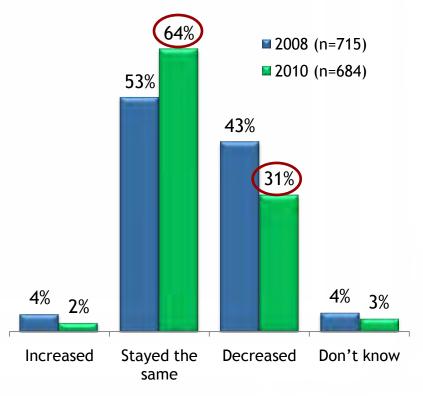
NEW2 Do you make approximately the same number of trips in the October through April period as you do in the May through September period?



Changes in Travel Behavior

- Two-thirds (64%) of infrequent Puget Sound ferry travelers utilization of WSF has remained unchanged.
 - This is significantly higher than the 53% in 2008.
- Significantly fewer infrequent travelers have decreased their travel over the past year compared to findings in 2008 (26% overall and 31% infrequent travelers vs. 43%, respectively).
- Of the 26% who have decreased their travel:
 - 34% decreased it somewhat
 - 37% decreased it significantly
 - 26% stopped riding completely (this equates to 7% of Puget Sound residents having stopped using WSF - same as in 2008)
- There are no significant difference between East and Westside residents.

Changes in Travel Behavior Compared to Last Year Infrequent Travelers



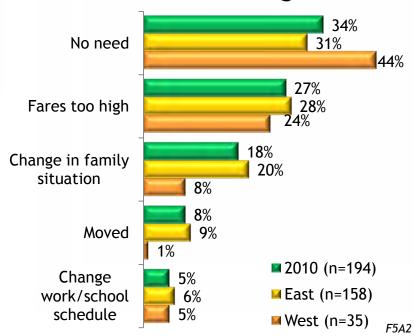
F4A Over the past year, would you say the frequency with which you ride Washington State Ferries has... [READ LIST]



Reasons for Riding Less Frequently

- The two most frequently mentioned reasons for riding less frequently are: "have no need" 34% and "ferry fares are too high" 27%.
 - Those findings are consistent with the findings from 2008.

Main Reasons for Riding Less:



- F5A1 What is the primary reason you are riding Washington State Ferries less often?
- F5B1 Why else are you riding less often?

- Among the 7% who have stopped riding completely the main reasons for doing so are: (n=69)
 - 45% Have no need
 - 15% Change in family situation
 - 13% Ferry fares are too high
 - 10% Don't leave the house
- These reason are again consistent with findings from 2008.
- Sample size is not sufficient for analysis by subsegment.
- Very few people mentioned the following reasons for decreasing their ridership and the sample sizes were too small to discern if improving these aspects of ferry operations would impact their ferry ridership:
 - ferry fares are too high
 - ferry travel takes too long
 - ferries waits are too long
 - ferries are unreliable
 - ferry schedule is inconvenient
 - time between ferry sailings is too long

What is the primary reason you have stopped riding Washington State Ferries completely?

Why else have you stopped riding the ferries completely? You mentioned [INSERT Q5A1] as the primary reason you ride the ferries less often. If this service on the ferries was improved, would you...

F5B2

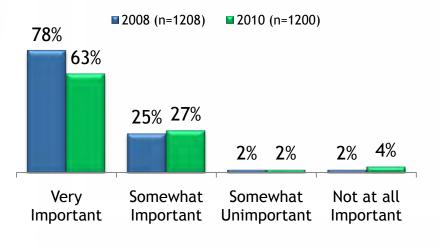
F6A1



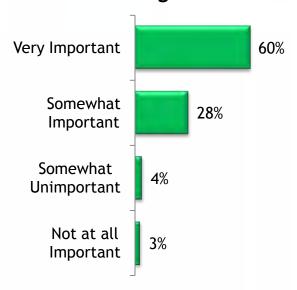
Importance of WSF to the Region

- The perceived importance of WSF to the general economy and growth of the economy has declined significantly.
 - The Westside communities place significantly more importance on WSF than Eastside communities (77% vs. 61% very important).

Importance of WSF to Economy and Growth of the Region



Importance of WSF to Encourage Tourism



Again, the Westside communities place significantly more importance on WSF to encourage tourism than Eastside communities (69% vs. 59% very important).

F7 Based on what you know, have read, or experienced, in your opinion, how important are Washington State Ferries to the general economy and growth of the region? Would you say...

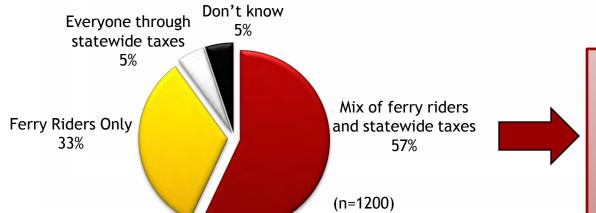
NEW3 Based on what you know, have read, or experienced, in your opinion, how important are Washington State Ferries to encouraging tourism in the region? Would you say...



Ferry Funding - Daily Operations

- Almost three in five (57%) think that the daily operating expenses for WSF should be funded through a mix of ferry riders and statewide taxes.
 - There are no significant difference between East and Westside communities on how daily operations should be funded.
- Among those who thinks the daily operations should be funded through a combination of fares and taxes, a third (33%) don't know what percent should be paid by riders. Those who have an opinion, state that on average riders should pay 56.6% of the daily operating costs.

How WSF Daily Operations Should Be Funded



Ferry riders should pay on average <u>56.6%</u> of WSF's daily operating costs

 Eastside residents report that riders should pay an average of 57.6% vs. 49.2% for Westside residents.

NEW4 Which of the following three ways to pay for the daily operations of the ferry system do you support the most? Do you believe that the cost of daily operations should be covered by:

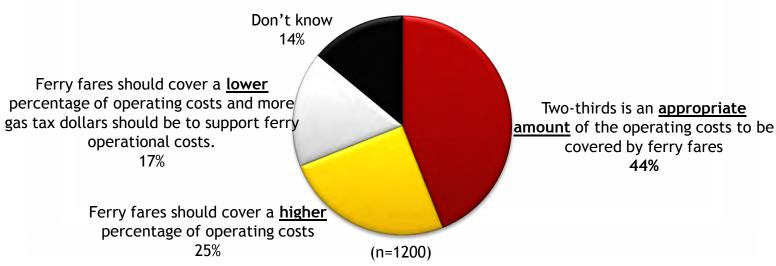
NEW5 What percent of the daily operation costs do you feel riders should pay?



Ferry Funding - Annual Operating Expenses

- On average, Puget Sound residents thinks that fares cover 44.2% of WSF's annual operating expenses (Eastside 43% vs. 51% Westside).
- Almost half (44%) think that it is appropriate that ferry fares cover 2/3 of operating expenses.
 - Westside residents are significantly more likely to think that fares should cover a smaller percentage (27% vs. 15%), where as Eastside residents think that fares should cover a greater percentage (26% vs. 13%).

How Much Should Fares Cover of Annual Operating Costs



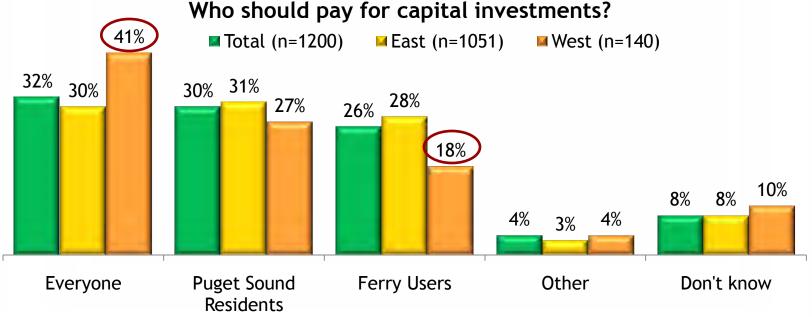
NEW6 What percentage of WSF's annual operational costs do you think fares currently cover?

NEW7 On average, fares cover about two-thirds of the ferries' yearly operating costs. The other third is subsidized by gas taxes raised from citizens across Washington State. Knowing that, do you feel ferry fares should cover a higher, lower, or the current percentage of yearly ferry operational costs?



Ferry Funding - Capital Investments

- Residents are divided in roughly thirds when it comes to who should pay for capital investments.
 - Westside residents are significantly more likely to say "everybody" should pay and they are less likely to want "ferry users" to pay compared to Eastside residents.



NEW8 Daily ferry operations are one cost, and they are covered about two-thirds by ferry fares and one-third by state gas tax subsidies. But there is also a cost to build new or replacement ferries and terminals as the fleet ages or to add new boats as the population of Washington grows. The state needs to budget for this capital cost through some form of taxes. In your opinion, should the state raise the money for new or replacement ferries and terminals from:



Demographics

	Total (n=1200)	East (n=1051)	West (n=148)	2008 (n=1240)
Gender				
Male	49%	50%	47%	49%
Female	51%	50%	53%	51%
Household Size				
Single person	13%	14%	12%	15%
Multiple people	83%	84%	84%	85%
Average household size	3.2	3.2	3.1	3.0
Household with children	55%	56%	46%	40%
Single child	23%	24%	19%	17%
Multiple children	22%	20%	35%	43%
Age				
18-34	29%	29%	25%	28%
35-54	40%	40%	34%	41%
55 or older	28%	27%	33%	30%



Demographics

	Total (n=1200)	East (n=1051)	West (n=148)	2008 (n=1240)
Education				
HS graduate or less	20%	20%	21%	19%
Some college/technical school	26%	26%	35%	36%
College degree or higher	49%	51%	38%	45%
Employment				
Full-time	41%	42%	34%	49%
Part-time	8%	8%	6 %	13%
Self-employed	8%	8%	9%	3%
Not currently employed	40%	46%	43%	35%
Income				
Less than \$30,000	13%	13%	15%	13%
\$30,000 - \$74,999	30%	29%	37%	42%
\$75,000 or more	31%	34%	19%	45%



Appendix - Questionnaire

The survey was designed by Market Decisions Corporation with input from WSTC's research team and WSF.



Questionnaire

General Market Area & Infrequent Rider Survey

INTRODUCTION from MDC Research. Today / tonight we are conducting a survey to gather opinions on Washington state ferries. Please let me assure you that we are not selling anything. The survey is being conducted for Washington state researchpurposes only and your answers will be kept confidential. QUOTAS: 350 King excluding Vashon Island 40 Vashon Island (98070 and 98013) 200 Snohomish 200 Pierce 100 CLALLAM (98362, 98382, 98363), 50 ISLAND 40 JEFFERSON (98368, 98339, 98358, 98325, 98365, 98376, 98320), 150 KITSAP 20 SAN JUAN 50 SKAGIT (98221, 98257, 98238, 98292, 98273, 98233, 98232) **GENDER** MALE (50%) FEMALE (50%) **SCREENING** COUNTY Do you live in [INSERT COUNTY]? 1 NO → ASK: COUNTY2: What county do you live in? RECORD DON'T KNOW / REFUSED → TERMINATE Have you ever ridden a Washington State Ferry? 2 NO [SKIP TO F7] DON"T KNOW [SKIP TO F7] 8 REFUSED [SKIP TO F7] When was the last time you rode a Washington State Ferry? Was it...[READ LIST] Within the past 30 days, Within the past 3 months, Within the past 6 months, Six months to one year ago, Between 1 and 5 years ago, or

- F3A What was the last Washington State Ferry route that you took? [SINGLE MENTION]
- F3B What other Washington State Ferries routes, if any, have you taken? [SELECT ALL THAT APPLY]
 [IF RESPONDENT SAYS SAN JUANS PROBE: WERE YOU TRAVELING TO OR FROM ANACORTES
 OR WERE YOU TRAVELING INTERISLAND]
- F3C (IF MULTIPLE ROUTES SELECTED) What Washington State Ferry route do you take most often? [SINGLE MENTION] [IF RESPONDENT SAYS SAN JUANS PROBE: WERE YOU TRAVELING TO OR FROM ANACORTES OR WERE YOU TRAVELING INTERISLAND!

F3A	F3B	F3C	
11	11	11	Seattle / Bainbridge
12	12	12	Seattle / Bremerton
13	13	13	Edmonds / Kingston
14	14	14	Mukilteo / Clinton
15	15	15	Fauntleroy / Vashon
16	16	16	Fauntleroy / Southworth
17	17	17	Point Defiance / Tahlequah
18	18	18	Keystone / Port Townsend
19	19	19	Anacortes / San Juans (Includes Shaw, Orcas, Lopez, and Friday Harbor)
20	20	20	Interisland San Juans (Includes Shaw, Orcas, Lopez, and Friday Harbor)
21	21	21	Vashon / Southworth)
22	22	22	Anacortes or the San Juans/ Sidney
99	99	99	OTHER [SPECIFY]
		95	Don't take any one route more than another
	96		None / Don't take any other routes
97	97	97	DON'T KNOW
98	98	98	REFUSED

(DON'T ASK F4 IF F3A = DK)

You said your last ferry ride was on the[INSERT RESPONSE FROM F3A] ferry. What was your primary purpose for that particular trip?

(ASK F4N IF F3A = DK)

F4N What was the primary purpose for that last trip you took on a Washington State Ferry?

NEW1 For what other purposes do you take anyWashington State Ferries? [PROBE]

<u>F4</u>	NEW	
1	11	(Commute to / from work)
2	12	(Commute to / from school)
3	13	(Work related activity / business)
4	14	(Personal business / activity)
5	15	(Everyday shopping)
6	16	(Major shopping (e.g. Costco, Walmart
7	17	(Tourism / recreation)
8	18	(Travel to / from special event)
9	19	(Travel to from / see friends)
11	21	(Medical Appointments)
99	99	Some other reason [SPECIFY]
	88	No other reasons
97		DONT KNOW
98		REFLISED

More than 5 years ago?
[DO NOT READ] DON'T KNOW
[DO NOT READ] REFUSED



Questionnaire (cont.)

- F3A2 How often do you ride Washington State Ferries? [READ LIST IF NECESSARY]
 - 1 (At least once a week)
 - 2 (At least once a month)
 - 3 (At least once every 3 months) [SKIP TO F4A]
 - 4 (At least once every 6 months) [SKIP TO F4A]
 - 5 (At least once every year) [SKIP TO F4A]
 - 6 (Less often than once a year) [SKIP TO F4A]
 - 7 [DO NOT READ] VARIES [SKIP TO F4A]
 - 8 [DO NOT READ] DON'T KNOW [SKIP TO F4A]
 - [DO NOT READ] REFUSED [SKIP TO F4A]
- F3B2 [F3A < 3] In the last 30 days (month of April), approximately how many one-way trips did you take on Washington State Ferries? If you took a round-trip, count that as two-one way trips.

 IVERIFY THAT NUMBER GIVEN IS IN ONE WAY TRIPS!

ENTER NUMBER OF ONE-WAY TRIPS

997 DON'T KNOW

- NEW2 Do you make approximately the same number of trips in the October through April period as you do in the May through Septemberperiod?
 - 1 Yes
 - 2 No I make more trips in October through April
 - 3 No I make more trips in May through September
 - 7 Don't know
- F4A Over the past year, would you say the frequency with which you rideWashington State Ferries has... [READ LIST]
 - 1 Increased
 - Stayed the same, or [SKIP TO F7]
 - 3 Decreased [SKIP TO F4C]
 - 8 [DO NOT READ] DON'T KNOW [SKIP TO F7]
 - [DO NOT READ] REFUSED [SKIP TO F7]
- F4B [F4A =1] Would that be... [READ LIST]
 - 1 Increased somewhat, or [SKIP TO F6B2]
 - 2 Increased significantly [SKIP TO F6B2]
 - 8 [DO NOT READ] DON'T KNOW [SKIP TO F6B2]
 - [DO NOT READ] REFUSED [SKIP TO F6B2]
- F4C [F4A =3] Would that be ... [READ LIST]
 - 1 Decreased somewhat, [SKIP TO F5A1]
 - Decreased significantly, or [SKIP TO F5A1]
 - B Have stopped riding the ferries completely?[SKIP TO F5A2]
 - [DO NOT READ] DON'T KNOW [SKIP TO F5A1]
 - 9 [DO NOT READ] REFUSED [SKIP TO F5A1]

- F5A1 [IF F4A EQ 3 AND F4C NE 3] What is the primary reason you are riding Washington State Ferries less often? [CLARIFY]
- F5B1 [IF F4A EQ 3 AND F4C NE 3] Why else are you riding less often?
 [PROBE AND CLARIFY]
- F5A2 [IF F4C EQ 3] What is the primary reason you have stopped riding Washington State Ferries completely? [CLARIFY]
- F5B2 [IF F4C EQ 3] Why else have you stopped riding the ferries completely?[PROBE AND CLARIFY]
 - 11 FERRY FARES ARE TOO HIGH
 - 12 FERRY TRAVEL TAKES TOO LONG
 - 13 FERRIES WAITS ARE TOO LONG
 - 14 FERRIES ARE UNRELIABLE
 - 15 FERRY SCHEDULE IS INCONVENIENT
 - 16 TIME BETWEEN FERRY SAILINGS IS TOO LONG
 - 17 CHANGES IN MY WORK OR SCHOOL SCHEDULE
 - 18 CHANGED JOBS
 - 19 RETIRED / NO LONGER WORKING
 - 20 CHANGED RESIDENCES / MOVED
 - 21 WORK AT HOME / TELECOMMUTING
 - 22 CHANGE IN FAMILY SITUATION / MOVED / CHILDREN GROWN / FRIENDS MOVED
 - 23 HAVE NO NEED TO RIDE / DON'T DO WHAT WE USE TO DO
 - 24 NO OTHER REASONS (F5B1 and F5B2 only)
 - 25 NO REASON / JUST STOPPED
 - 26 PREFER TO DRIVE INSTEAD
 - 27 ELDERLY / DISABLED / MEDICAL REASONS / DON'T LEAVE HOUSE
 - 99 OTHER → Specify
 - 97 DON'T KNOW
 - 98 REFUSED
- F6A1 [IF F5A1 EQ 11-16] You mentioned [INSERT Q5A1 RESPONSE] as the primary reason you ride the ferries less often. If this service on the ferries was improved, would you. [READ LIST] [IF F5A2 EQ 11-16] You mentioned [INSERT Q5A2 RESPONSE] as the primary reason you stopped riding the ferries. If this service on the ferries was improved, would you..[READ LIST]
 - 1 Definitely ride more often
 - 2 Probably ride more often,
 - 3 Might ride more often, or
 - 4 Not ride any more often?
 - 8 [DO NOT READ] DON'T KNOW
 - 9 [DO NOT READ] REFUSED
- F6B1 [IF F5B1 EQ 11-16] You mentioned [RESPONSE F5B1] as other reasons why you ride the ferries less often. If these ferry services were improved, would you... [READ LIST] [IF F5B2 EQ 11-16] You mentioned [RESPONSE F5B2] as other reasons why you stopped riding the ferries. If these ferry services were improved, would you... [READ LIST]
 - Definitely ride more often,
 - 2 Probably ride more often,
 - 3 Might ride more often, or



Questionnaire (cont.)

- Not ride any more often?
- **IDO NOT READ!** DON'T KNOW
- [DO NOT READ] REFUSED
- [IF F4A = INCREASED] What would you say are the main reasons that you are riding Washington State Ferries more often? [CLARIFY]
 - Tolls on the Tacoma Narrows Bridge
 - 12 Ferry schedule more convenient now [need to know which route]
 - Changed iobs
 - 14 Changed residences / moved
 - 15 Change in family situation / family moved / children grown / friends moved
 - 16 Elderly / disabled / medical reasons / don't drive any more
 - 17 Increased traffic congestion on drive-around routes
 - 18 Had to come out of retirement and reioin work force
 - 19 New vacation home
 - 99 OTHER → Specify
 - 97 DON'T KNOW
 - REFUSED
- F6B3 [IF F6B2 = 12] You mentioned that ferry schedules are more convenient now. Whith ferry route(s) now has a more convenient schedule? [READ LIST]

F3C

- 11 Seattle / Bainbridge
- 12 Seattle / Bremerton
- 13 Edmonds / Kingston
- Mukilteo / Clinton 15 Fauntleroy / Vashon
- Fauntleroy / Southworth 16
- 17 Point Defiance / Tahlequah
- 18 Keystone / Port Townsend
- 19 Anacortes / San Juans (Includes Shaw, Orcas, Lopez, and Friday Harbor)
- 20 Interisland San Juans (Includes Shaw, Orcas, Lopez, and Friday Harbor)
- 21 Vashon / Southworth)
- 22 Anacortes or the San Juans/ Sidney
- 99 OTHER [SPECIFY]
- 97 DON'T KNOW
- REFUSED
- Based on what you know, have read, or experienced, in your opinion, how importantare Washington State Ferries to the general economy and growth of the region? Would you say. [READ LIST]
 - Very important,
 - Somewhat important.
 - Somewhat unimportant
 - Not important at all
 - [DO NOT READ] DON'T KNOW
 - [DO NOT READ] REFUSED

- NEW3 Based on what you know, have read, or experienced, in your opinion, how important are Washington State Ferries to encouraging tourism in the region? Would you say... [READ LIST]
 - Very important,
 - Somewhat important.
 - Somewhat unimportant
 - Not important at all
 - **[DO NOT READ]** DON'T KNOW
 - [DO NOT READ] REFUSED
- NEW4 Which of the following three ways topay for the daily operations of the ferry system do you support the most? Do you believe that the cost of daily operations should be covered by (READ
 - Ferry riders only, or (SKIP TO NEW6)
 - Everyone in the state of Washington through statewide taxes, or (SKIP TO NEW6)
 - A mix of both ferry rider fares and statewide taxes?
 - [DO NOT READ] DON'T KNOW (SKIP TO NEW6)
- NEW5 What percent of the daily operation costs do you feel riders should pay?

Don't know

NEW6 What percentage of WSF's annual operational costs do you think fares currently cover?

% → An estimate is fine Don't know/couldn't say

NEW7 On average, fares cover about two-thirds of the ferries' yearly operating costs. Theother third i subsidized by gas taxes raised from citizens across Washington State.

Knowing that, do you feel ferry fares should cover a higher, lower, or the current percentage of yearly ferry operational costs?

- Two-thirds is an appropriate amount of the operating costs to be covered by ferry fares
- Ferry fares should cover a higher percentage of operating costs
- Ferry fares should cover a lower percentage of operating costs and more gas tax dollars should be diverted from currently planned statewide transpotation activities and/or the statewide gas tax should be increased to support ferry operational costs.
- Don't know/couldn't say
- NEW8 Daily ferry operations are one cost, and they are covered about twothirds by ferry fares and one-third by state gas tax subsidies. But there is also a cost to build new or replacement ferries and terminals as the fleet ages or to add new boats asthe population of Washington grows. The state needs to budget for this capital cost through some form of taxes. In your opinion, should the state raise the money for new or replacement ferries and terminals from (READ LIST)
 - Everyone in the state, or
 - Those that live in the Puget Sound Region, or
 - 3 Only from those that use the ferries?
 - [DO NOT READ] Other → Specify
 - [DO NOT READ] DON'T KNOW



Questionnaire (cont.)

DEMOGRAPHICS

D1	How many no	onle live invol	ir hausahald	including yourself?

997 Don't know 998 Refused

D2 (IF D1>1) How many children under the age of 18 currently live in your household?

Percord:

997 Don't know

998 Refused

D3 What is your age?

- 1 18 24 2 25 – 34 3 35 – 44 4 45 – 54 5 55 – 64 6 65 or older 8 Refused
- D4 What is the highest level of education you have completed?
 - 1 Did not finish high school
 - 2 HS graduate/GED
 - 3 Some college/technical school
 - 4 Associate/2-year/other degree
 - 5 College graduate
 - 6 Some graduate school
 - 7 Graduate degree
 - 8 Refused
- D5 Which of the following best describes your situation?[READ LIST]
 - 11 Employed full time
 - 12 Employed part time
 - 13 Self-employed
 - 14 Retired
 - 15 Homemaker
 - 16 Student
 - 17 Unemployed and looking for work
 - 18 Unemployed and not looking for work
 - 19 Unemployed due to disability
 - 99 Other
 - 98 Refused

- D6 What is your current marital status?
 - Married or living with a partner/significant other
 - 2 Single/divorced/widowed/separated
 - 9 Other
 - 8 Refused
- D7 Which of these categories best describes your total household income in 2009 [READ LIST]
 - 1 Less than \$15,000
 - 2 \$15.000 to \$29,999
 - \$30,000 \$49,999
 - 4 \$50,000 \$74,999
 - 5 \$75,000 \$99,999
 - 6 \$100,000 or more
 - 7 DK
 - Refused
- D8 Are you registered to vote in the state of Washington?
 - 1 YES
 - 2 No

Thank you and have a wonderful day!



Appendix B - Weighting Scheme

The following page shows how the data was weighted.



Weighting Scheme

			Puget Ea	st Males		Puget East Females						
Age	18-24	25-34	35-44	45-54	55-64	65+	18-24	25-34	35-44	45-54	55-64	65+
Population Counts	155,360	245,609	278,308	265,806	182,283	151,222	141,686	235,107	268,985	267,252	189,678	200,997
Population % of Total	5%	8%	10%	9 %	6%	5%	5%	8%	9 %	9 %	6%	7%
Sample Count	20	18	48	77	92	132	9	19	51	80	88	126
Sample % of Total	2%	2%	4%	7 %	8%	11%	1%	2%	4%	7%	8%	11%
Weights	3.05197	5.36097	2.27801	1.35627	0.77845	0.45010	6.18523	4.86164	2.07219	1.31251	0.84685	0.62674

		F	erry Affe	cted Male	es	Ferry Affected Females						
Age	18-24	25-34	35-44	45-54	55-64	65+	18-24	25-34	35-44	45-54	55-64	65+
Population Counts	20,404	27,541	27,446	30,735	25,265	28,535	16,142	25,200	27,937	33,426	25,784	34,614
Population % of Total	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%
Sample Count	4	7	12	20	44	76	2	6	20	25	38	73
Sample % of Total	0%	1%	1%	2%	4%	7%	0%	1%	2%	2%	3%	6%
Weights	2.00413	1.54580	0.89861	0.60377	0.22560	0.14751	3.17102	1.65014	0.54881	0.52531	0.26659	0.18629

		Fe	erry Deper	ndent Mal	es	Ferry Dependent Females						
Age	18-24	25-34	35-44	45-54	55-64	65+	18-24	25-34	35-44	45-54	55-64	65+
Population Counts	597	861	1,739	2,474	1,660	1,861	508	930	2,062	2,731	1,600	2,136
Population % of Total	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Sample Count	0	1	1	7	11	8	1	1	2	5	10	15
Sample % of Total	0%	0%	0%	1%	1%	1%	0%	0%	0%	0%	1%	1%
Weights	0	0.33828	0.68324	0.13886	0.05929	0.09140	0.19959	0.36539	0.40507	0.21460	0.06286	0.05595

Puget Sound East = King, Snohomish, Skagit, Pierce
Ferry Affected = Kitsap, Clallam, Island, Jefferson
Ferry Dependent = Vashon, San Juan